

How To Use Crystal Reports - WIC

Table of Contents

| | |
|------------------------------|--------|
| Logging Into Crystal Reports | Page 2 |
| Selecting Reports | Page 4 |
| Printing Reports | Page 5 |
| Exporting Reports into Excel | Page 7 |

How To Use Crystal Reports - WIC

Logging into Crystal Enterprise

1. Go to the Missouri WIC Homepage and then to the Local WIC Provider Homepage. Click on Data & Statistical Reports.



2. Click on the Missouri WIC Data Reports link. If you do not have access, complete an ASAP request form.



3. Once logged on, you should see the following screen. Click on the plus sign in front of the folder named Public Folders

System: Crystal1
User Name: LPHA e-mail Userid
(Example: Michelle Nienhuis is Nienhm)
Password: First Initial of your first name, first initial of your last name and the last four numbers of your SSN (ab####).
Authentication: Enterprise

Log On to InfoView

Welcome to BusinessObjects

Enter your user information and click Log On.
(if you are unsure of your account information, contact your system administrator)

System:

User name:

Password:

Authentication:

How To Use Crystal Reports - WIC

4. **Please Note:** When you click on the (+) plus sign by a folder, you will only see the folders available under that folder. When you click the folder name, you will only see the individual files under that folder.

The image displays three screenshots of the Business Objects XI Release 2 interface, illustrating the navigation process. The top two screenshots show the 'Home' page with the 'Folders' pane on the left. In the first screenshot, a red diamond highlights the '+' icon next to 'Public Folders'. In the second screenshot, a red diamond highlights the '+' icon next to 'WIC Reports - Local Agency'. The third screenshot shows the 'WIC Reports - Local Agency' folder expanded, with a red bracket highlighting the subfolders: 'Caseload Management', 'Clinic Management', 'Monitoring Reports for 2008/2009', 'MOWINS End of Month Reports', 'Webinars - MOWINS Releases', and 'WIC Reports - State and District'. A blue callout box points to this list with the text: 'Click on the name of the folder that has the report you want.'

Business Objects XI Release 2

Home

Personalize InfoView

Go to InfoView

Business Objects XI Release 2

Home

Personalize InfoView

Go to InfoView

InfoView - Windows Internet Explorer

http://crystalweb.dhss.mo.gov/businessobjects/enterprise115/InfoView/main.aspx

InfoView

Business Objects XI Release 2

WIC Reports - Local Agency

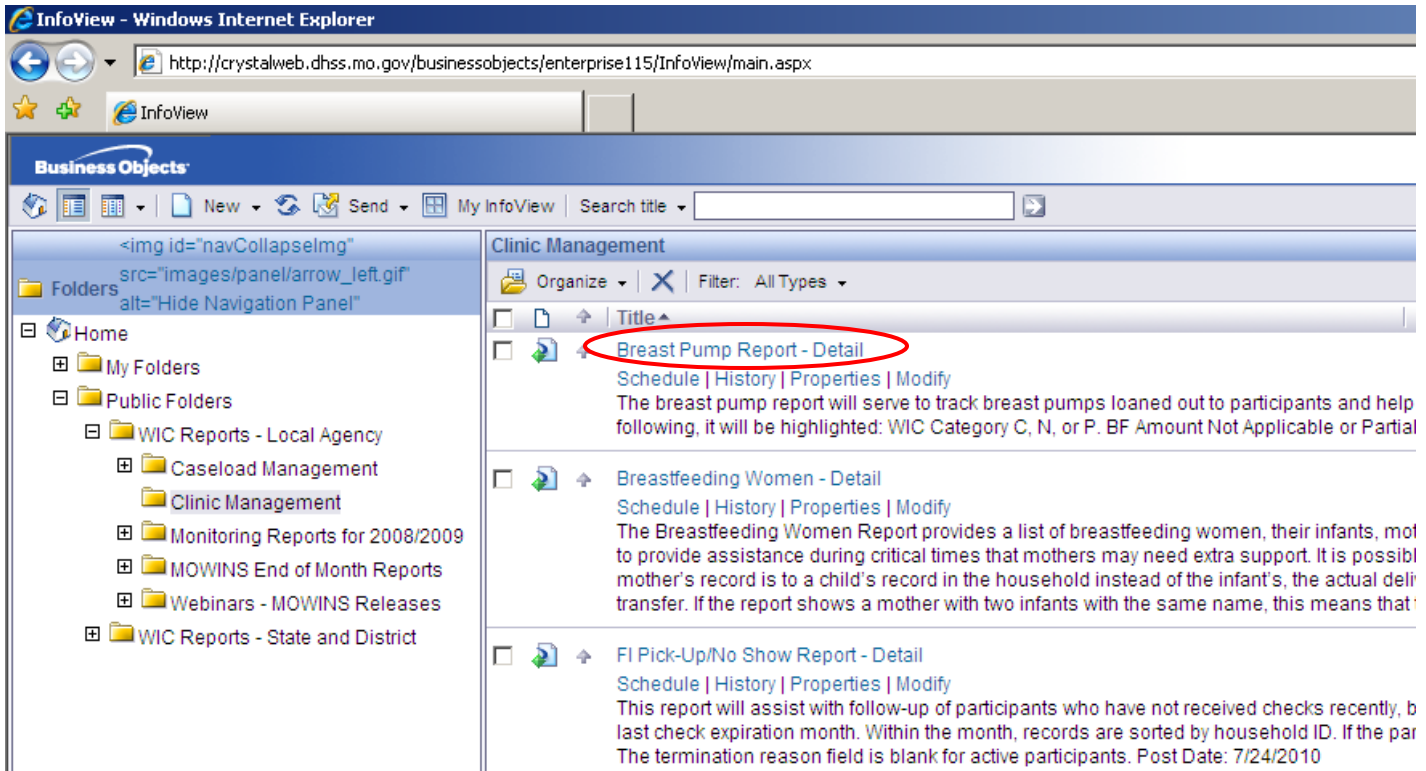
Organize | Filter: All Types

Title | Last Run

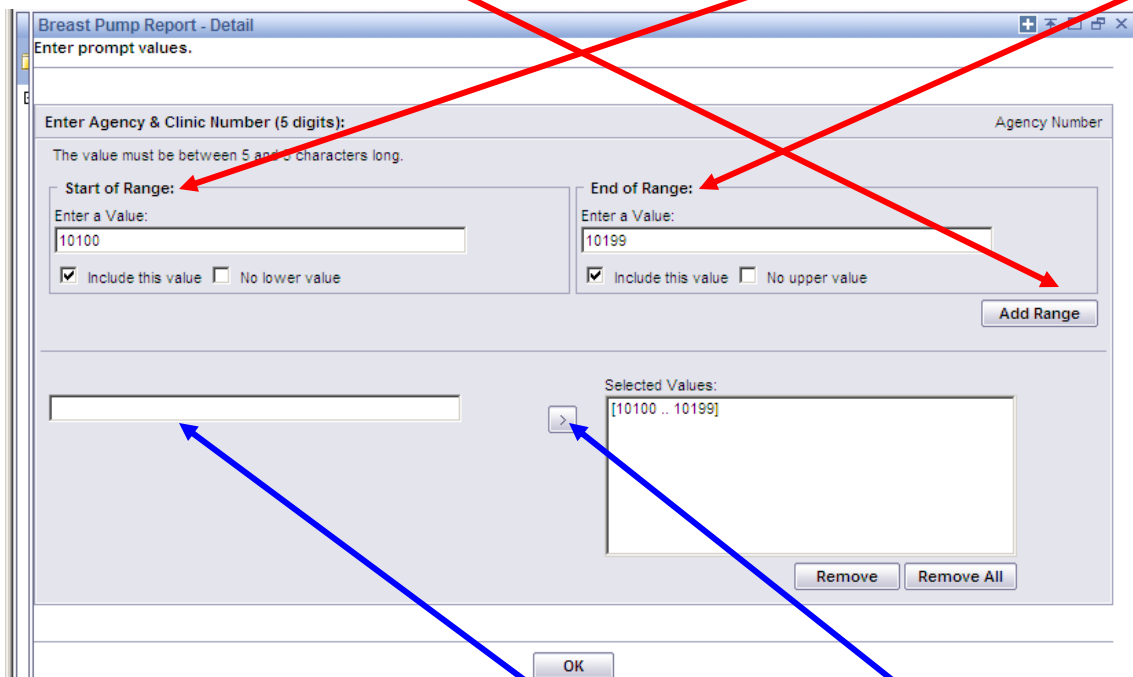
Click on the name of the folder that has the report you want.

How To Use Crystal Reports - WIC

- Click on the name of the report you want to run.



- When you have selected the report you will see the following screen asking for the parameters of the search. Interactive reports have prompt screens for parameter values as seen below. For an agency that has multiple satellite sites, enter a beginning ###00 and ending range ###99 and then click on Add Range to add it to the selected values box. Then click OK.



- For an agency with only one site, enter the single site then click on the arrow to add it to the selected values box. Then click OK.

How To Use Crystal Reports - WIC

To search for an item, say a SWID, type in the DCN and then click the binoculars.

Click on the arrows to move from one page to another.

Missouri Department of Health and Senior Services
WIC and Nutrition Services

Breast Pump Report - Detail

ANDREW COUNTY HEALTH DEPARTMENT (10199)

| Participant Name | Household ID State WIC ID | WIC Category Amount Breastfeeding | Breast Pump Issue Date Serial # | Cert Due Date | Last Check LDTU | Phone Number Secondary Phone |
|------------------|------------------------------|--------------------------------------|------------------------------------|------------------|--------------------|---------------------------------|
|------------------|------------------------------|--------------------------------------|------------------------------------|------------------|--------------------|---------------------------------|

8. To print reports, you will need to select the Export icon located above the LWP number on the left side of the screen.

Missouri Department of Health and Senior Services
WIC and Nutrition Services

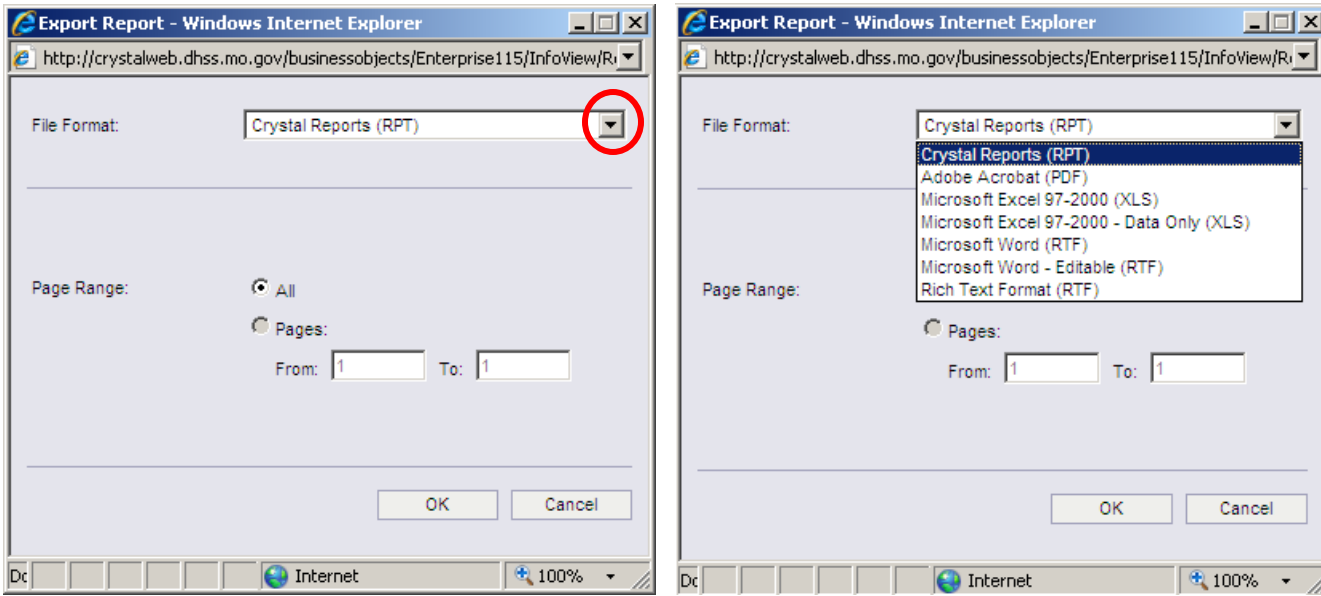
Breast Pump Report - Detail

ANDREW COUNTY HEALTH DEPARTMENT (10199)

| Participant Name | Household ID State WIC ID | WIC Category Amount Breastfeeding | Breast Pump Issue Date Serial # | Cert Due Date | Last Check LDTU | Phone Number Secondary Phone |
|------------------|------------------------------|--------------------------------------|------------------------------------|------------------|--------------------|---------------------------------|
|------------------|------------------------------|--------------------------------------|------------------------------------|------------------|--------------------|---------------------------------|

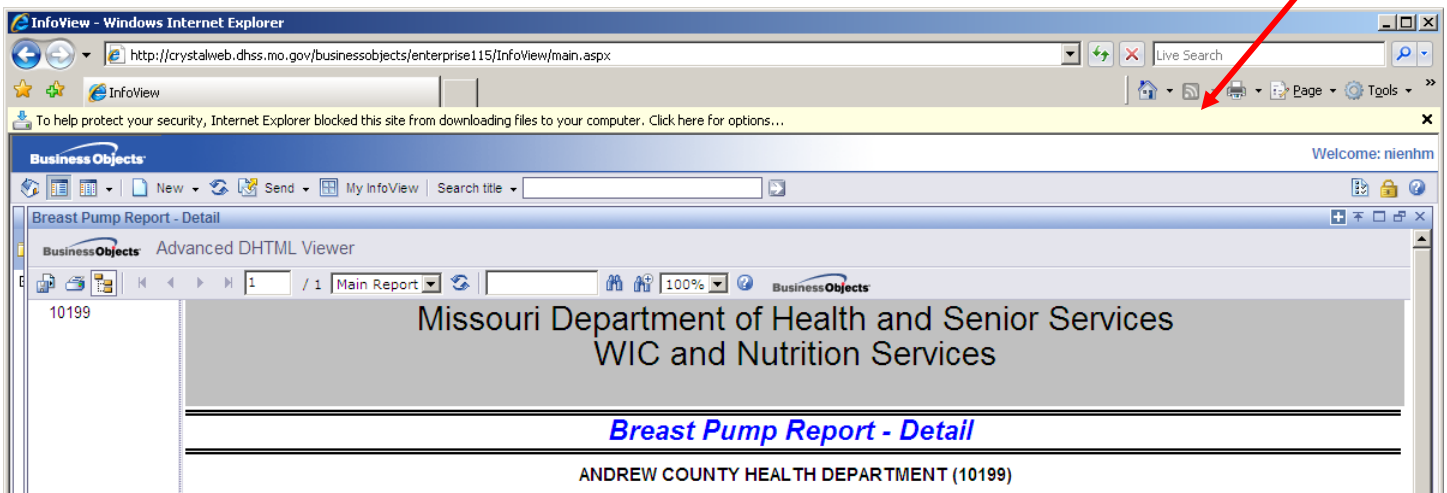
How To Use Crystal Reports - WIC

9. The window below will open.



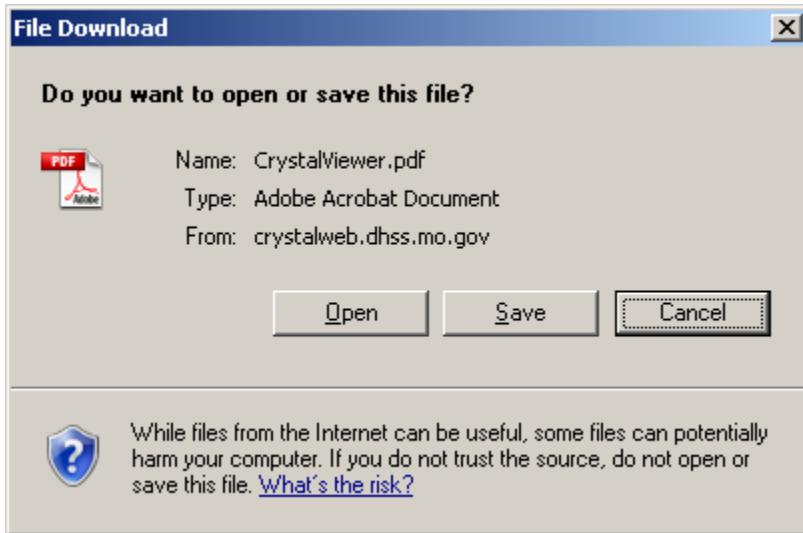
10. Select the type of format from the drop down box that you would like to print the report. (Selecting the .pdf format will look the most like the report in Crystal.) Click OK.

11. You may notice the yellow security bar at that opened on your screen. If you do, click the bar and select "Download File". This happens the first time you log in. Once the file has been downloaded, the request will not be made again unless you log off and then back in.

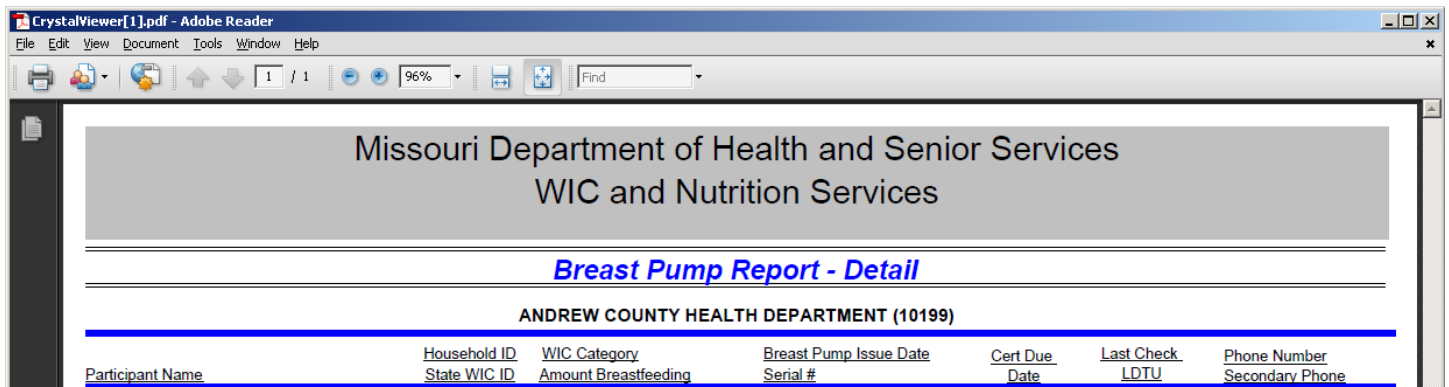


12. This will return you to step 4. Repeat steps 4 - 10. After selecting the format to export and click ok, another window will open asking if you would like to open, save or cancel the document.

How To Use Crystal Reports - WIC



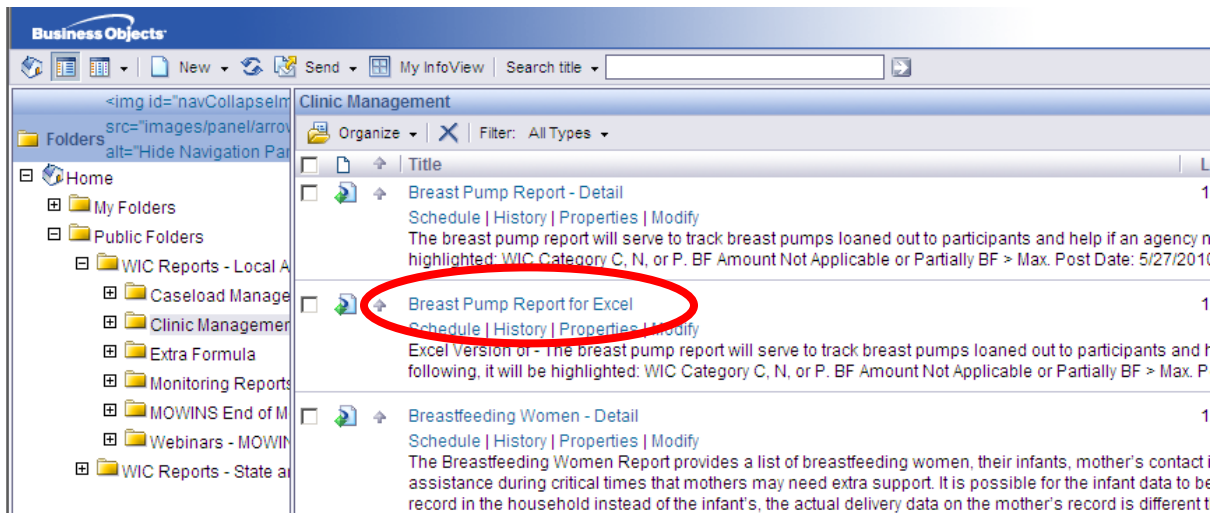
Select Open.



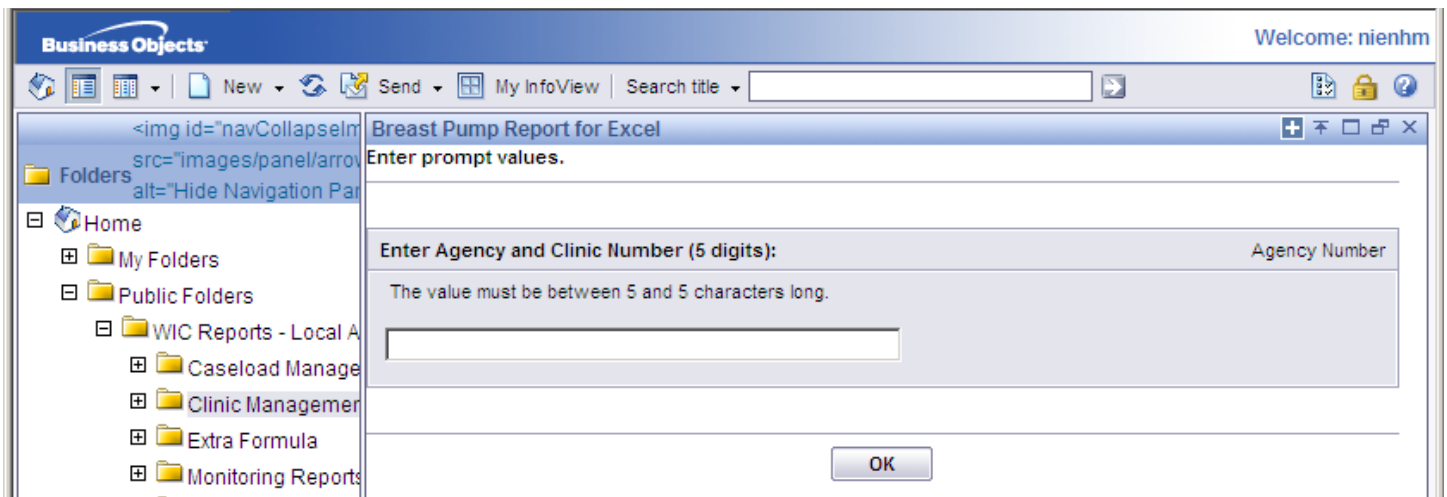
Exporting reports into Excel

Select the report you would like to export to Excel. The reports that are set up for Excel state "XXXXXX for Excel".

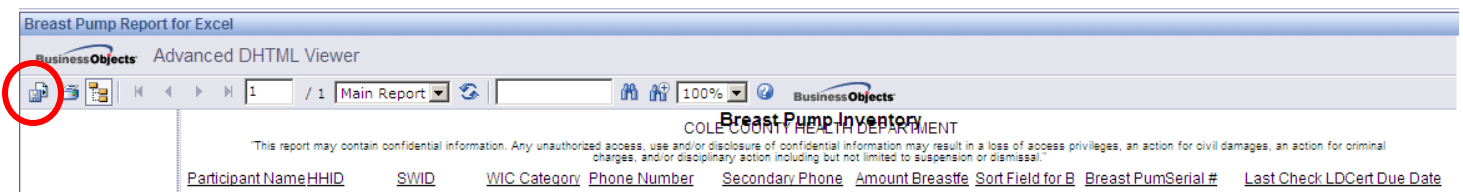
How To Use Crystal Reports - WIC



Clicking on the title will open the parameter page so you can select your clinic. **Please note:** If your agency has multiple satellite sites, each clinic will have to be run separately due to the conversion from Crystal to Excel.

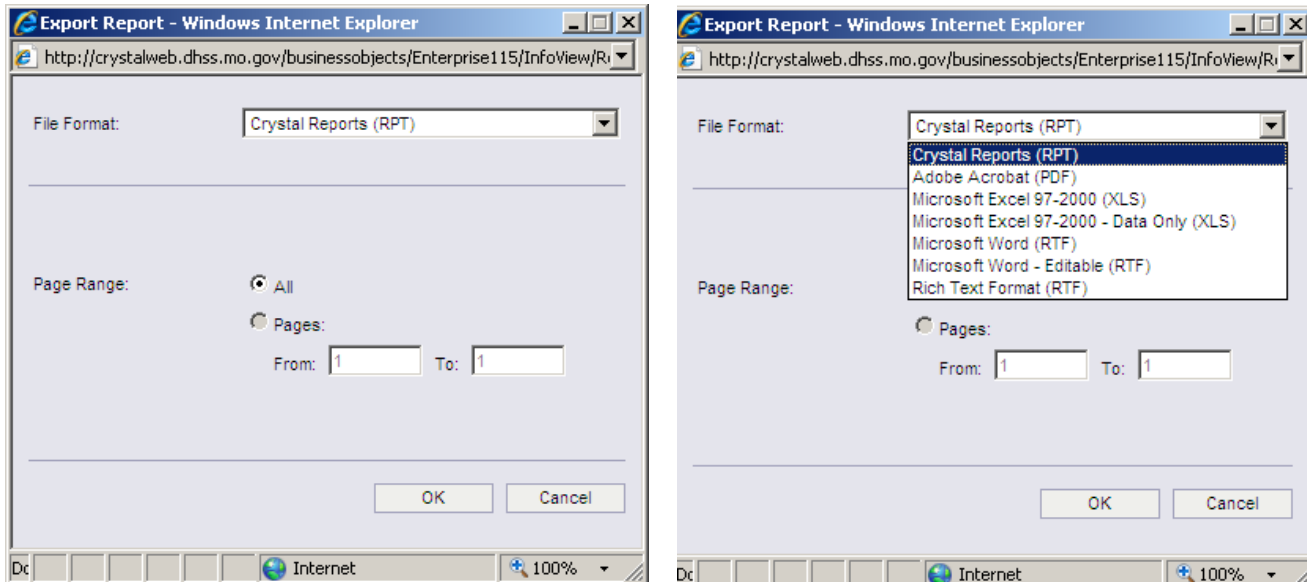


Enter your Agency and Clinic Number then OK. When the report opens, it will **NOT** look pretty. To export the report, you will need to select the Export icon located to the left side of the screen.

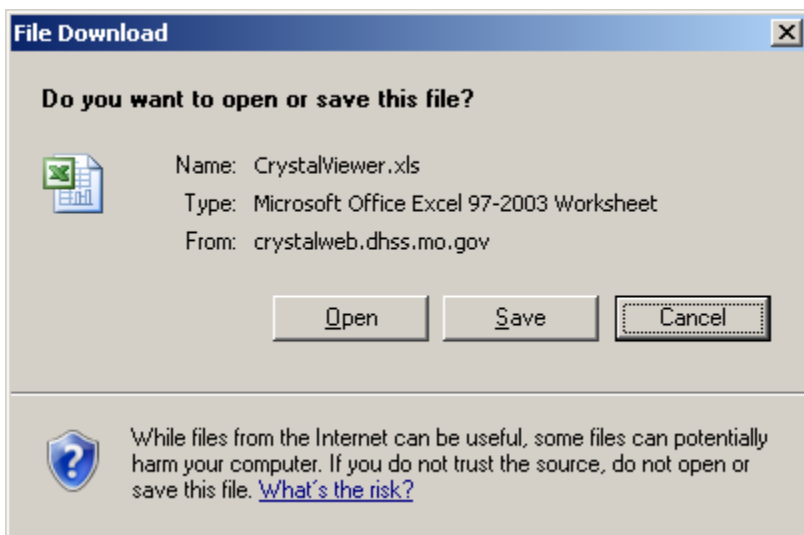


The window below will open.

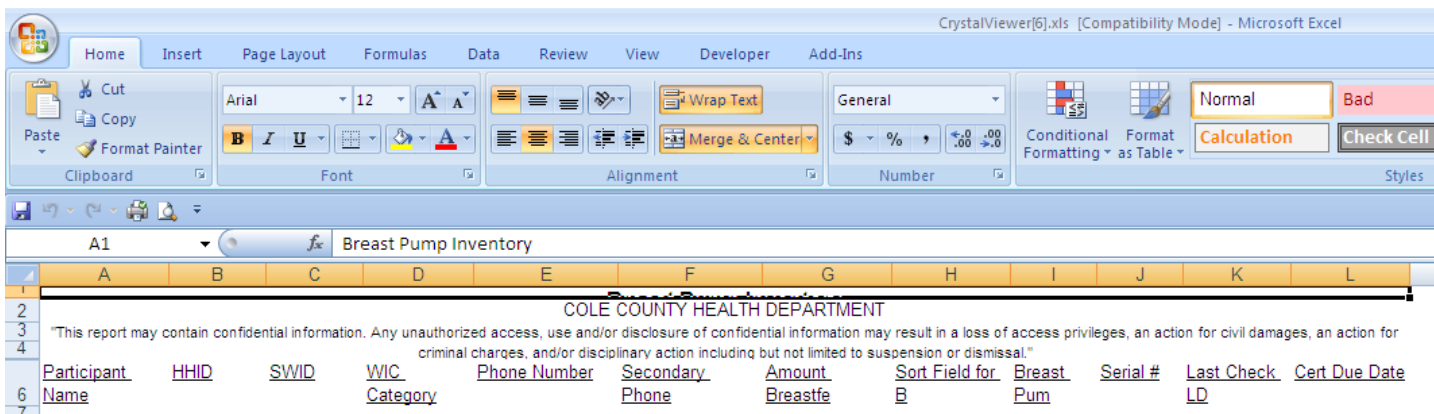
How To Use Crystal Reports - WIC



Select Microsoft Excel 97-2000 (XLS) and Click OK



Select Open.



The report will open and be useable in Excel. At this point, all of the cells can be formatted and have the ability to be sorted, highlighted, etc.